



Foreign Agricultural Service

GAIN Report

Global Agriculture Information Network

Voluntary Report - public distribution

Date: 5/23/2003

GAIN Report #MO3008

Morocco

Grain and Feed

New Grain Crop Estimates

2003

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Report Highlights:

The GOM released its estimates for the 2003 crop. Wheat crop is expected to reach its third highest level ever which should impact negatively on imports especially that the GOM announced a significant increase of customs duties for bread wheat starting June 1, 2003.

Includes PSD changes: Yes

Includes Trade Matrix: No

Unscheduled Report

Rabat [MO1], MO

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Executive Summary

First Ministry of Agriculture estimates for the 2003 grain crop confirm that Morocco is having a bumper crop this year. Wheat crop, at 5.38 MMT, is expected to reach its third highest level ever. Abundant rainfall throughout the country during the planting season boosted planting significantly and provided adequate conditions for early development of the plants. Spring rainfall allowed generally good development of heads and better grain fillings this year.

Harvest Year	1998	1999	2000	2001	2002	5 Years Average		Forecast March 2003	MinAg Estimates 2003
Planted Area, (1,000 hectares)									
- Durum Wheat	1,127	1,078	1,079	977	882	1,028		1,100	1,100
-Soft Wheat	1,960	1,614	1,823	1,724	1,745	1,773		1,800	1,900
Total Wheat	3,087	2,692	2,902	2,701	2,626	2,801		2,900	3,000
Barley	2,426	2,070	2,251	2,126	2,002	2,175		2,150	2,300
Total Planted	5,513	4,761	5,153	4,827	4,629	4,976		5,050	5,300
Production, (1,000 MT)									
-Durum Wheat	1,544	800	427	1,039	1,032	968		1,400	1,840
-Bread Wheat	2,834	1,354	953	2,278	2,325	1,949		2,700	3,540
Total Wheat	4,378	2,154	1,381	3,316	3,357	2,917		4,100	5,380
Barley	1,970	1,474	467	1,155	1,669	1,347		2,900	2,620
Total Production	6,348	3,628	1,848	4,472	5,026	4,264		7,000	8,000

As a result, the demand for imported wheat will be lower this year, especially during the first few month to allow the local crop to be marketed. The GOM announced recently a change in duty system that will be implemented starting June 2003. The new system will result in a significant increase of the bread wheat duties and should not allow any substantial imports during the coming months (separate report to be sent soon). However, imports of wheat are likely to go back to normal by the beginning of next calendar year since the local wheat production will not suffice to fulfill the local demand.

Barley imports are also expected to be down significantly during the next marketing year because of a combined large feed supply (better pasture conditions, larger cereal straw and feed production) and anticipated large barley grain production. Barley is used for feed and food in Morocco and was heavily imported during the past few drought years for food but mostly to help small farmers to maintain their herds. Imports during the next marketing year will also depend heavily on the rainfall during next fall (pasture conditions).

PSD Table						
Country	Morocco					
Commodity	Wheat				(1000 HA)(1000 MT)	
	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		07/2001		07/2002		07/2003
Area Harvested	2701	2701	2626	2626	2900	3000
Beginning Stocks	1350	1281	1541	1153	1298	900
Production	3316	3316	3357	3357	4500	5380
TOTAL Mkt. Yr. Imports	3075	2909	2700	2800	1700	1200
Jul-Jun Imports	3075	2909	2700	2800	1700	1200
Jul-Jun Import U.S.	152	158	0	30	0	100
TOTAL SUPPLY	7741	7506	7598	7310	7498	7480
TOTAL Mkt. Yr. Exports	100	153	100	150	100	150
Jul-Jun Exports	100	153	100	150	100	150
Feed Dom. Consumption	200	0	200	0	200	0
TOTAL Dom. Consumption	6100	6200	6200	6260	6200	6300
Ending Stocks	1541	1153	1298	900	1198	1030
TOTAL DISTRIBUTION	7741	7506	7598	7310	7498	7480

PSD Table						
Country	Morocco					
Commodity	Barley				(1000 HA)(1000 MT)	
	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		07/2001		07/2002		07/2003
Area Harvested	2126	2126	2002	2002	2150	2300
Beginning Stocks	124	212	220	212	189	170
Production	1155	1155	1669	1669	2800	2620
TOTAL Mkt. Yr. Imports	691	813	300	410	100	200
Oct-Sep Imports	689	749	300	500	100	200
Oct-Sep Import U.S.	0	0	0	0	0	0
TOTAL SUPPLY	1970	2180	2189	2291	3089	2990
TOTAL Mkt. Yr. Exports	0	0	0	0	0	0
Oct-Sep Exports	0	0	0	0	0	0
Feed Dom. Consumption	1300	1300	1300	1400	1400	1300
TOTAL Dom. Consumption	1750	1968	2000	2121	2100	2300
Ending Stocks	220	212	189	170	989	690
TOTAL DISTRIBUTION	1970	2180	2189	2291	3089	2990